APPENDIX 2

County Training Framework

APPENDIX 2a

County Training and Data Collection Framework

SB 2030 - Child Welfare Services Workload Study

Revised County Training and Data Collection Framework

Context Update

Due to technical and logistical issues, the training and data collection plan has been modified. The final **revised** schedule for training and data collection is now set for the period from August 30 to October 17, 1999. Aside from shifting the training and data collection for the Valley and Valley Mountain counties from mid-August to late September, there are only minor date or zone assignment changes. *Please review the revised schedule and zone assignments below.*

Revised *Training and Data Collection Schedule*

Zone	Regions	Training Week	Data Collection Weeks
Zone 2	Southern (Large Urban)	August 30 - September 3	September 7 - 20
Zone 3	Bay & Northern	September 7 - 13	September 14 - 27
Zone 4	Southern (Small & LA Phase One)	September 13 - 17	September 21 - October 4
Zone 5	Los Angeles (Phase Two)	September 21 - 27	September 28 - October 11
Zone 1	Valley & Valley Mountain	September 27 -October 1	October 4 – October 17

General Training Plan

To reiterate and update information in our earlier memo regarding the training plan, counties will need to identify trainers to attend a "train the trainers" session to be scheduled at one or more locations in each Zone. The trainers session will be held either the Monday or Tuesday of the Zone training week (although the Zone 3 sessions will be held on Tuesday the 7th and Wednesday the 8th). There will be two "train the trainers" sessions that will last approximately four hours and be scheduled from 8-12 noon or
1-5pm. A trainer will only need to attend one of those sessions. Trainers will then be expected to return to their counties and deliver training to all participating staff during the remaining days of the training week. The number of trainers needed by each county will depend on the size of the county workforce and the logistics required at the county level to organize the local training events in the county during the remainder of the week. It is anticipated that in small counties the training role may be combined with that of the county coordinator, and that in large counties several trainers with specialized assignments will be required. Counties will be advised of the location and schedule for the "train the trainers" sessions in the near future. However, we anticipate that the trainings will be held in the counties listed on the Zone assignment list below in *bold italics*.

Trainer Qualifications and Expectations

Trainers selected by the county agency ideally should have working knowledge of the Child Welfare Services program and hands on facility with Microsoft Excel and the local CWS/CMS server technology *including the county's e-mail system.* At a minimum, trainers will be expected to 1) attend one of the "train the trainers" sessions, 2) assist in organizing logistics for the local training events, 3) offer local training, 4) provide primary technical support to the workforce during data collection, and 5) work with the county coordinator to facilitate

additional technical assistance as needed from the contractors. *We also suggest that county Automated Training Mentors (ATMs) be included in the trainers a county chooses to send.*

Please plan to provide a list of the trainers who will attend the train the trainers session by August 16th to the contractor's training coordinator (see contact information below). *We will assume that those staff identified for the Valley and Valley Mountain counties will attend the rescheduled training unless the training coordinator is otherwise notified.*

Local Training Facilities

Counties will need to organize and schedule training facilities for staff. Efforts for establishing central sites for the various regions involved are currently underway. Information regarding the details will be forwarded to the appropriate county contacts. The training facility will feature enough PCs to allow all trainees to practice using the time study format.

Site Training Plan Assistance

You are encouraged to contact the contractor's training coordinator for additional information on the above issues. Please contact:

Dana Hollinshead, Workload Study Training Coordinator
American Humane Association
63 Inverness Drive East
Englewood, CO 80112
(303) 792 - 9900
(303) 792 – 5333 fax
dana@americanhumane.org

Revised Zone Composition

Note: At this point in time, trainings are expected to be held in those counties in *bold italics*. Details will follow once sites are confirmed.

Zone 1 --

Fresno	*Valley*
Kings	Valley
Madera	Valley
Mariposa	Valley
Merced	Valley
San Luis Obispo	Valley
Tulare	Valley
Tuolomne	Valley
Alpine	Valley Mountain
Amador	Valley Mountain
Calaveras	Valley Mountain
El Dorado	Valley Mountain
Inyo	Southern
Mono	Valley Mountain
Nevada	Valley Mountain
Placer	Valley Mountain
Sacramento	***Valley Mountain***
San Joaquin	Valley
Sierra	Valley Mountain
Stanislaus	Valley
Sutter	Valley Mountain
Yolo	Valley Mountain
Yuba	Valley Mountain

Zone 2 --

Counties	Regions
Imperial	Southern
Orange	*Southern*
Riverside	Southern
San Bernardino	Southern
San Diego	Southern

Zone 3 –

Counties	Regions
Alameda	Bay – North
Contra Costa	Bay – South
Marin	Bay – North
Napa	Bay – North
San Francisco	*Bay – North*
Solano	Bay – North
Sonoma	Bay – North
Monterey	Bay – South
San Benito	Bay – South
San Mateo	Bay - South
Santa Clara	*Bay - South*
Santa Cruz	Bay - South
Butte	Northern
Colusa	Northern
Del Norte	Northern
Glenn	*Northern*
Humboldt	*Northern*
Lake	Northern
Lassen	Northern
Mendocino	Bay - North
Modoc	Northern
Plumas	Northern
Shasta	Northern
Siskiyou	Northern
Tehama	Northern
Trinity	Northern

Zone 4 –

Counties	Regions
Santa Barbara	Southern
Ventura	Southern
Kern	Southern
Los Angeles (Phase One)	*Southern*

Zone 5 –

Counties	Regions
Los Angeles (Phase Two)	*Southern*

APPENDIX 2b

"Train the Trainers" Agenda

California Department of Social Services
SB 2030 Time Study Training Agenda
Train the Trainers
August, September 1999

Introductions	10 Min
Review of Agenda/ Purpose	10 Min

Basic Training on Workload

Overview of the Project Expectations of Participants	10 Min

Units of Service and Tasks
    General Definitions
    California Specific Units of Service and Tasks
	45 Mins

Data Collection Instruments
    Types of Participants
    Computer Form
    Paper Form
	45 Mins

Break	15 Mins

Train Trainers Session

Materials Needed for Trainees	10 Mins
Addressing Trainee Concerns	10 Mins
Accessing Technical Assistance	10 Mins
Quality Assurance Reporting	10 Mins
Site Specific Planning Issues	1 Hour

    Possible Topics
        County Based Technical Support
        Transferring of Files to and From Participants
        Large Scale Paper Data Entry

Adjourn/Evaluate

APPENDIX 2c

Study Participants Agenda

California Department of Social Services
SB 2030 Time Study Training Agenda
Study Participants
August, September 1999

Introductions   10 Min

Overview of the Project
     Expectations of Participants   10 Min

Units of Service and Tasks   30 Mins
     General Definitions
     California Specific Units of Service and Tasks

Data Collection Instruments   60 Mins
     Types of Participants
     Computer Form
     Paper

Site Specific Plans   30 Mins to 1 Hour

     Possible Topics
          Accessing County Based Technical Support
          Transferring of Files to and From CWS/CMS Server
          Large Scale Paper Data Entry

APPENDIX 2d

Training Presentation

SB 2030 Child Welfare Services Workload Study Training

Training Presentation

Time Study Training Overview

- Overview of the SB2030 Project
  - Expectations of Participants
- Units of Service and Task Codes
- Data Collection Instruments
  - Basic Excel Functions
  - Completing the Time Study Form
- Training and Technical Assistance Supports

American Humane Association, 1999

Overview of the SB2030 Project

■ *Purpose:* Collect and analyze data for use in developing a model for budgetary allocation that reflects changes to the Child Welfare Services (CWS) workload and the impact on the workload of implementing best practices.

■ *Methodology:* Policy Review, Focus Groups, 100% Time Study, Workload Standards, and Budget Analysis

■ *Time Study Time Frame:* One week training, Data Collection for weeks 2 and 3, staggered throughout the state. Project Report due to CDSS 1/1/00.

American Humane Association, 1999

Expectations of Participants

■ 100% participation from all 58 counties

■ Track all work time for two weeks including leave time

■ Accurately reflect how time is spent

■ Enter data into computer form

■ Submit data daily via server-connected computers

American Humane Association, 1999

Units of Service and Task Codes

■ *Units of Service Defined:* A unit of service, or services, is a way of describing the major activities that correspond to a case (either a child or family), to a service provider, or to administrative or clerical work activities.

■ *Tasks Defined:* Tasks are the detailed activities that combine to make up a unit of service. Tasks are usually short-term activities performed during a single day.

–The list you will use covers units of services and tasks that may not be distinct or even exist in your county. Only use those that apply to your work.

American Humane Association, 1999

California Specific Units of Service and Tasks

Refer to Unit of Service and Tasks List and Definitions

American Humane Association, 1999

Overview of Data Collection Form

- Paper Form vs. Computer Form
- Content of both:
  - Cover Page
  - Caseload Page
  - Case Characteristics
  - Daily Log Pages

Data Collection Procedures Differ Depending on Type of Staff

- Different Groups of Staff with CWS/CMS ID

  - *CWS/CMS server* - Obtains installation copy from personal computer, installs application, populates caseload automatically. Saves data daily directly to server.

  - *Stand alone computer* - Obtains installation copy from disk, obtains caseload file from disk and copies both to stand alone computer then installs. Saves data daily to hard drive and copies data to disk to be copied to server by county technical support staff.

  - *Paper only* - Obtains paper copy from coordinator, cover page can be pre-printed or caseload data written in by participant. Paper forms entered by participant or by data entry staff based on procedures developed by county. Preferred data entry on computers with CWS/CMS server access.

Data Collection Procedures Differ Depending on Type of Staff

■ Different Groups of non Case Carrying Staff

• *CWS/CMS server* - Obtains installation copy from personal computer, installs application. Saves data daily directly to server.

• *Stand alone computer* - Obtains installation copy from disk, copies to stand alone computer then installs. Saves data daily to hard drive and copies data to disk to be copied to server by county technical support staff.

• *Paper only* - Obtains paper copy from coordinator. Paper forms entered by participant or by data entry staff based on procedures developed by county. Preferred data entry on computers with CWS/CMS server access.

American Humane Association, 1999

Installation and Activation of the Computer Form

■ Initial Installation of the Computer Form

  – *Personal Computers linked to the County Server*

  – *Stand alone computers (i.e. ones that are not connected to CWS/CMS)*

■ Initial Activation of the Computer Form

American Humane Association, 1999

Completing the Time Study Form

■ **Cover Page Information**
- **Enter on Viewer**
  - *Employee's County ID Number*
  - *Employee's CWS/CMS ID Number*
  - *Employee's Name (First Name then Last Name)*
  - *County Number*
- **Enter on Cover Page**
  - *Supervisor's Name and Phone Number*
  - *Number of Years/Months Employed by CWS*

American Humane Association, 1999

Basic Excel Application Functions

■ Opening and Saving Files

■ Moving Around on a Page

■ Moving Between Pages

■ Adjusting Screen View

■ Using Drop Down Lists

■ Moving Boxes

■ Minimizing and Maximizing Windows

American Humane Association, 1999

Completing the Time Study Form.

■ **Caseload Page Information**

- *Case ID Number, Case Last Name, Case First Name*

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Completing the Time Study Form

■ **Special Case Characteristics Page Information**

- *Case ID Number*
- *Case Name*
- *Case Characteristics*

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Completing the Time Study Form

Special Case Characteristics

- AB 1741 Youth Pilot Program
- Courtesy Supervision
- DEC
- Family to Family Pilot
- H.O.P.E. Court
- Healthy Start
- ICWA
- Medically Fragile
- Mental Health
- MISC (special project)

- Multilingual
- Options for Recovery
- Out-of-county placement
- Out-of-state placement
- PEN
- Probation (601/602)
- Residential
- Sexual abuse unit
- Structured Decision Making
- System of Care (COMPASS)
- Wraparound services

American Humane Association, 1999

Completing the Time Study Form

- **Daily Log Pages Information**
  - *Employee Name and ID*
  - *Date*
  - *Total Hours (Computer only)*
  - *Work Start*
  - *OPC (Other Person's Case)*
  - *Case Number (Computer only), Case Name*
  - *Unit of Service Category*
  - *Unit of Service*
  - *Task Type*
  - *Task*
  - *Finish Time*

American Humane Association, 1999

Completing the Time Study Form.

■ **Saving, Closing, and Sending the Data**
- Computer version
  - Instructions for Server-Connected Personal Computers
  - Instructions for Stand Alone Computers
- Paper version
  - County Specific Plan
    - **Individuals Enter Their Own Data**
    - **Mass Data Entry by Support/Clerical Staff**

American Humane Association, 1999

Completing the Time Study Form

■ Work Scenarios Exercise

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STOP!!!
END OF PARTICIPANT
TRAINING

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BEGINNING OF
TRAINERS' TRAINING

American Humane Association, 1999
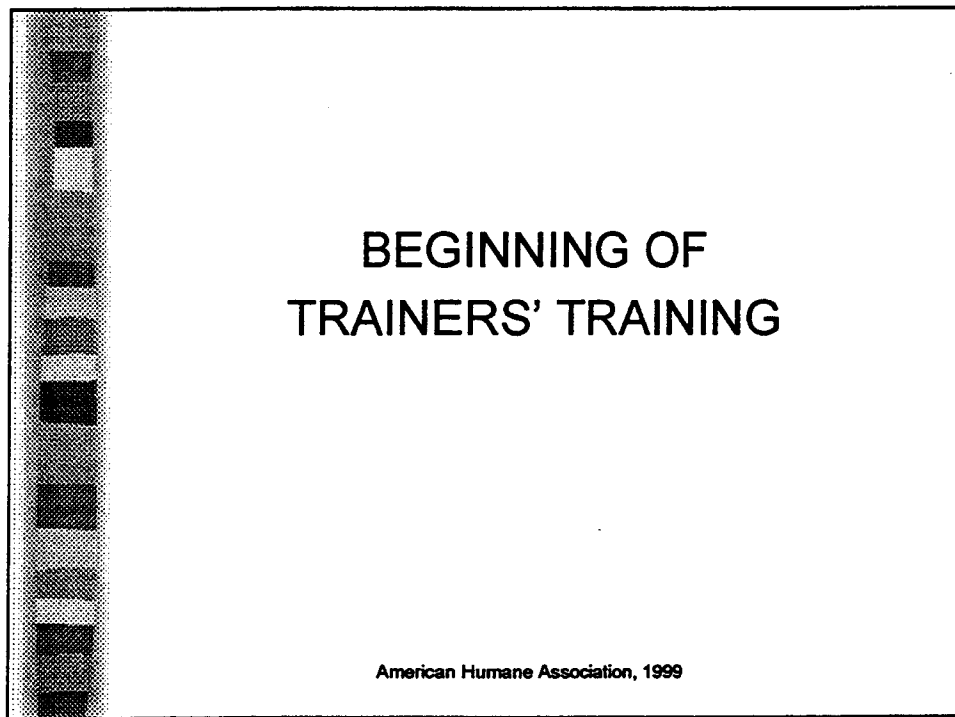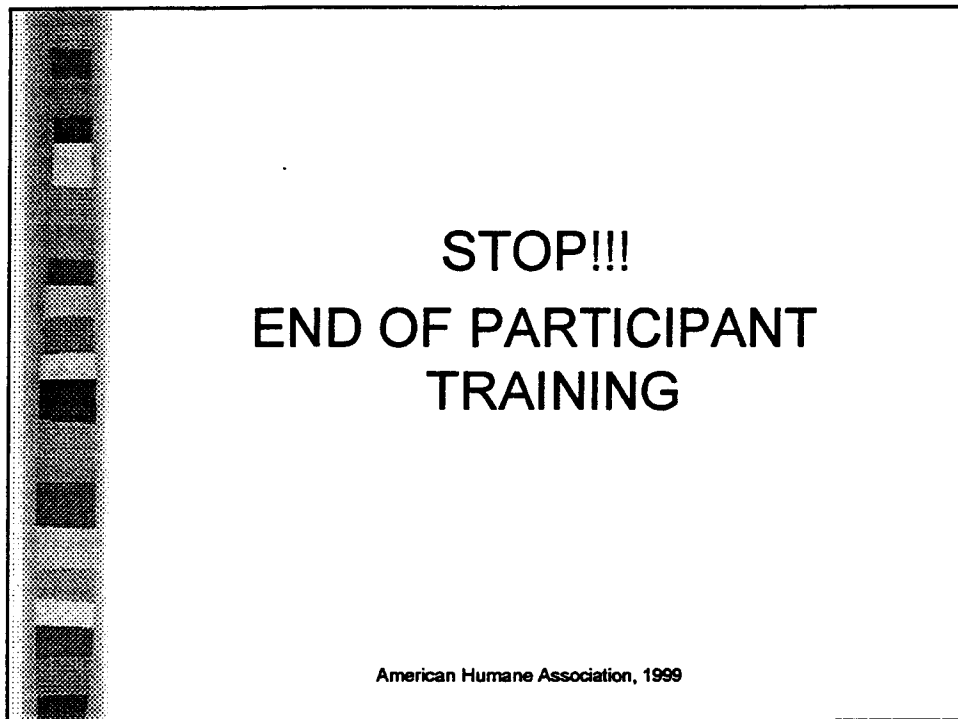
Materials Needed for Trainees

- **Participant Training Agenda***
- **Units of Service Task Lists and Definitions***
- **Training Instructions***
- **Data Collection Forms***
  - Disk with Application and Data File (for stand alone computers)
  - Copies of Paper Forms
- **County Contacts/Procedures for Technical Support**
- **Other County Procedures**
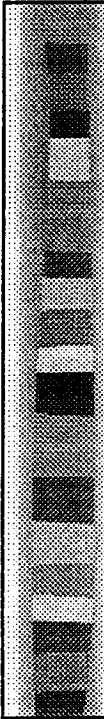- **Power Point Slides (optional)***

*Copy Provided at Train Trainers Session

American Humane Association, 1999

Training and Technical Assistance Supports

- **Accessing Technical Assistance**
  - Each county provides local technical support for staff on the hardware, network, file copying, basic Microsoft office functions, etc.
  - Local county trainers address basic concerns about use of codes, definitions, etc., based on written material, training, and bulletin board updates
  - Designated county coordinators contact AHA project team for other substantive or application related concerns (24 hour per day access)
- **Frequently Asked Questions**
  - CDSS Website
    - » http://www.dss.cahwnet.gov/sb2030
  - CWS/CMS Website
    - » http://www.hwcws.cahwnet.gov

American Humane Association, 1999

Training and Technical Assistance Supports

■ **Addressing Concerns of Study Participants**

- Technical Issues

- Study Content

- Priorities (casework vs. the study)

- Confidentiality of Data
    - Quality Assurance
    - Aggregate Results

Training and Technical Assistance Supports

■ **Data Quality Assurance**
- Quality Assurance Reports Provided to County Coordinator
- *Twice per Week Report*
    - *Expected Participants*
    - *Summary of Data Received*
    - *Error Reports*
- *Post Data Collection Report*
    - *Expected Participants*
    - *Summary of Data Received*

Other Data Collection Planning Concerns

■ **County Based Technical Support**

– Distribution of Data Collection Forms (Computer and Paper Versions)

– Installation Support

– Day to Day Technical Support

– Day to Day Time Study Questions/Procedures Support

– Retrieving Files and Copying to the Server

■ **Backup Planning for Staff Absent from Rollout Training**

– Training by Unit Supervisor

– Makeup Sessions

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Other Data Collection Planning Concerns

■ **Transferring of Forms to and From Participants**

– Applicable to staff with CWS/CMS ID and non-case carrying staff

•*CWS/CMS server* - Obtains installation copy from personal computer, installs application, populates caseload automatically. Saves data daily directly to server.

•*Stand alone computer* - Obtains installation copy from disk, obtains caseload file from disk and copies both to stand alone computer then installs. Saves data daily to hard drive and copies data to disk to be copied to server by county technical support staff.

•*Paper only* - Obtains paper copy from coordinator, cover page can be pre-printed or caseload data written in by participant. Paper forms entered by participant or by data entry staff based on procedures developed by county. Preferred data entry on computers with CWS/CMS server access.

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Other Data Collection Planning Concerns

- **Large Scale Paper Data Entry**
  - Distributing the Data Collection Form
  - Data Entry Arrangements
  - participant enters own data
  - data entry staff enters data for multiple workers
    - *How will participating staff get document to data entry staff?*
    - *How often will participating staff submit documents?*
    - *What part of the document will be submitted?*
    - *Setting up multiple copies of the Excel Application for data entry staff (each copy of the application is for one study participant)*
    - *Need for hard drive space, zip procedures, or disks*
  - Proofing/Correction Plan

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APPENDIX 2e

A Workday Scenario for a Supervisor

A WORK DAY SCENARIO FOR A SUPERVISOR

- This supervisor for a family preservation unit has been on call since the previous evening.
- She gets a crisis call about a case (Ashley Rogers), at 5:28 am, talks with police and a shelter facility director about the crisis until 6:15 am. She then calls a local hospital to authorize an evaluation, and talks to the hospital until 6:45 am.
- Goes into the office early to follow up on this crisis, arriving at 7:30 am.
- Reads case file (Ashley Rogers) until 7:55 am.
- Break time, gets coffee, through 8:05 am.
- Meets with Jane Jones, case worker for Ashley Rogers, until 8:47 am.
- Reads email and checks messages until 9:12 am.
- Reviews a court report about a new investigation in a family maintenance case (Billy Jones), until 9:55 am.
- Takes the finished court report and other paperwork to a support staff for distribution, goes over support issues and helps prioritize jobs for the day, until 10:14 am.
- Reviews resumes for an open worker position. Called for references on several applicants. Finished at 10:33 am.
- Plans this afternoon's unit meeting, until 10:52 am.
- Reads new policy and procedures memo, until 11:00 am.
- Attends supervisory planning session on SB2030 workload study.
- Goes to lunch at 12:30 pm. Returns at 1:11 pm.
- Reads email and checks messages until 1:22 pm.
- Break and coffee time before unit meeting, which starts at 1:30 pm.
- Unit meeting, 1:30 – 2:30 pm, followed by cake and a party for a worker who is taking maternity leave, until 3:05 pm.
- Does 8 case assignments, until 3:30 pm.
- Prepares monthly statistics draft report by hand, until 3:59 pm.
- Tries to get into the computer application to update the monthly statistics and the computer locks up; calls for computer support, closes out and reboots computer, until 4:17 pm.
- Computer application comes back up, so she enters the monthly report until 4:45 pm.
- Reads and approves 7 cases; 4 of those take about 2 minutes each, the other 3 take 6 minutes each (Joey Plant, Claude Cash, and Sue Smith). Finishes at 5:11 pm.
- Goes home, not on call tonight.

APPENDIX 2f

A Workday Scenario for a Worker

A WORK DAY SCENARIO FOR A WORKER

- Worker arrives at work 8:12 a.m.
- Gets a cup of coffee and returns to desk 8:17 a.m.
- Reads mail and checks e-mail until 8:32 a.m.
- One minute later receives a phone call from the mother in the Sue Smith FM case, and talks until 8:40 a.m.
- Called Sue Smith's therapist and talked about what Ms. Smith had told the worker about rescheduling with the therapist, until 8:52 a.m.
- Left the office and drove to another CWS office to meet with a Multi-disciplinary team on one of the worker's former Family Maintenance cases, that is now another worker's Family Reunification case. Drove until 9:30 a.m.
- Met with the other worker and other members of the Multi-disciplinary team until 11:00 a.m.
- Worker drove from the meeting to a restaurant near worker's office, until 11:30 a.m.
- Worker had lunch at the restaurant and left at 12:20 p.m.
- Worker arrived at her office at 12:32 p.m.
- Worker entered data on CWS/CMS on a client visit with the Rose Kirk case from yesterday. Enter data until 1:35 p.m.
- Worker sat at her desk and planned what her strategy would be for the Rose Kirk case based on yesterday's visit. At 1:45 p.m. worker left office to drive to the Kirk home.
- The worker arrived at the Kirk home at 2:35 p.m.
- A child in the case answered the knock on the door and the worker entered and talked with the child about problems the child was still having with the parent, until 3:05 p.m.
- Then the worker and the child talked with the parent for a few minutes, then the worker asked the child to go to her room so the worker could talk with the parent in private. The talk with the parent ended at 3:40 p.m.
- The worker drove back to the office, arriving at 4:50 p.m.
- The worker went into the office of the worker next door to her office. These two workers had a good supportive relationship, and the worker was frustrated with the events of the last visit with the Kirks and wanted to talk strategy with the other worker. This discussion lasted until 5:05 p.m. when both workers went home.
- At 9:30 p.m. the worker received a call from the teenage child in the Kirk case. This call lasted until 10:00 p.m.

APPENDIX 2g

Number of Staff Trained During "Train-the-Trainer" Sessions

Approximate number of Staff Trained During "Train-the-Trainer" Sessions[1]

County	# Staff Trained	County	# Staff Trained
Alameda	8	Placer	9
Alpine	1	Plumas	3
Amador	1	Riverside	15
Butte	5	Sacramento	68
Calaveras	3	San Benito	1
Colusa	1	San Bernadino	23
Contra Costa	16	San Diego	11
Del Norte	2	San Francisco	55
El Dorado	2	San Joaquin	2
Fresno	8	San Luis Obispo	3
Glenn	3	San Mateo	14
Humboldt	7	Santa Barbara	4
Imperial	2	Santa Clara	13
Inyo	1	Santa Cruz	3
Kern	5	Shasta	4
Kings	3	Sierra	1
Lake	1	Siskiyou	3
Lassen	2	Solano	4
Los Angeles	108	Sonoma	2
Madera	2	Stanislaus	6
Marin	2	Sutter	7
Mariposa	2	Tehama	2
Mendocino	4	Trinity	2
Merced	2	Tulare	3
Modoc	2	Tuolumne	3
Mono	1	Ventura	6
Monterey	7	Yolo	2
Napa	1	Yuba	2
Nevada	1		
Orange	35	State Total	511

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[1] These numbers were gathered by tallying those names listed on the project team's sign in sheets, which were circulated and collected at each session.